

Creating  
**real value.**



## Real Estate Team

### Somerset CPAs

Somerset's Real Estate Team approaches every real estate transaction with the entire business picture in mind.

Whether from the perspective of the developer, broker, property manager, leasing or tenant representative, advice regarding all real estate decisions is given in the larger context of the business and individuals involved. Because we understand how our clients' businesses operate, as well as their goals and objectives, we use our real estate knowledge and experience to create positive, profitable outcomes.

Our Real Estate Team provides comprehensive services for both the business and the owner that enable us to be your business advocate, not just your CPA. We also have areas of expertise in construction and design, valuations, information technology, investment management, negotiation, financing assistance and—possibly most importantly—advantageous tax strategies. If you are looking for dependable financial advice combined with creative solutions, call on Somerset CPAs.

Our integrated approach analyzes every aspect of a real estate transaction along with how each issue affects the business and owner objectives. In a world that is as complex as real estate, Somerset can help you make sound business decisions to help you achieve your objectives. Somerset has a strong specialty in the real estate industry and has many dedicated professionals who are passionate about helping their real estate clients succeed.

Find out how Somerset CPAs can help you look at your real estate ventures in a new way. Call 317-472-2200 or 800-469-7206 today and request a complimentary initial consultation.

# Real Estate Team Services Offered

## Consulting Services

- Entity selection
- Project analysis, including financial proformas and budgeting
- Operational reviews
- Internal control analysis
- Review and evaluation of lease agreements
- Review and analysis of acquisition, disposition and financing transactions
- Like-kind exchange consulting and facilitation
- Cost segregation studies
- Audits of U.S. Dept of Housing and Urban Development-subsidized projects
- Valuation of ownership interests
- Succession planning and wealth transfer consulting
- Loan workouts and lender negotiation

## Assurance Services

- Audit, review and compiled financial statements
- Performance of agreed-upon audit procedures
- Forensic accounting

## Tax Services

- Corporate tax returns
- Shareholder tax returns
- Individual and corporate tax planning
- Creative tax strategies
- Cost recovery studies to optimize depreciation deduction
- Multi-state tax planning and strategy development
- Sales, use, property and excise tax analysis

Corby Thompson, President, The Thompson Companies

“The Thompson Company receives accounting services from Somerset’s real estate division. I’ve been impressed with the firm’s abilities and professionalism. I have complete faith that our best interest is being serviced through Somerset’s work. The work quality is the strongest aspect of Somerset’s service. This is why we don’t hesitate to refer Somerset to others.”

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